Completing a Manual Event Enrollment Overview

This Job Aid provides a walkthrough of the steps a Locality BA must complete to submit a manual benefit event on behalf of the employee. These steps include using the Review BAS Activity page to create the event and the On-Demand Event Maintenance Page to process the event. For qualifying life events not completed through ESS, the employee must submit a life event form along with the supporting documentation to the BA with all the information necessary to complete the benefit enrollment process.

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![Cardinal logo]

Manual Event for Benefit Enrollment

This job aid uses the following example scenario: An employee has submitted a life event form with supporting documentation for a birth event to their Locality BA. The Locality BA must add the BIR manual event, add the child dependent, complete the updated benefit enrollment, and finalize the benefit event.
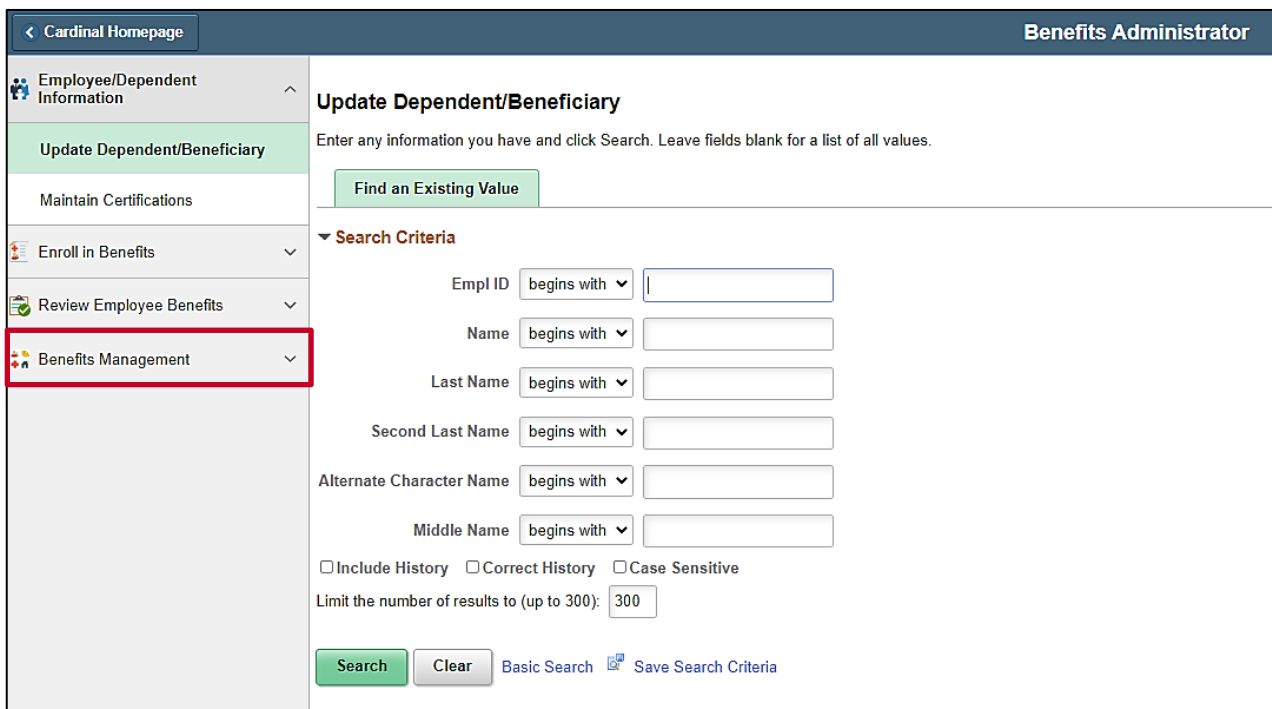
1. Navigate to the **Cardinal Homepage.**

The **Cardinal Homepage** displays.
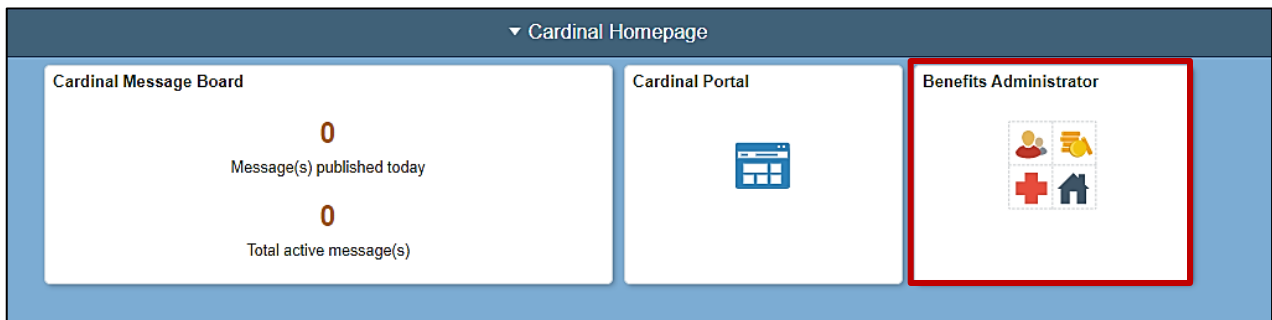
2. Click on the **Benefit Administrator tile** on the Cardinal Homepage.

The **Benefits Administration** page displays with the **Employee Dependent/Beneficiary** tab displayed by default.

3. Click the **Benefits Management** list item on the left-hand side of the screen.

The **Benefit Management** tab displays.

4. Click the **Review BAS Activity** list item on the left-hand side of the screen.

The **Review BAS Activity** page displays.

Note: This page contains two scroll bars. Make sure to scroll all the way down on both the page scroll bar and the table scroll bar before continuing.

5. Click the **+** button to add a row.

The **BAS Activity** page refreshes and displays a new row to input data.

6. Enter the **Empl ID**.

7. The Effective Date defaults to today's date. Enter the **Effective Date** for the Manual Event accordingly.

8. Enter the **BAS Action** for the Birth Life Event (BIR). The magnifying glass can be used to search for the BAS Action if unknown.

   Note: If the manual life event triggers COBRA coverage (e.g., a DIV event), the BA has to also fill out the COBRA code associated to that manual event on the **BAS Activity** page.

9. Click **Save.**

10. Click on the **On-Demand Event Maintenance** list item on the left-hand side of the screen.

The **On-Demand Event Maintenance** page displays.
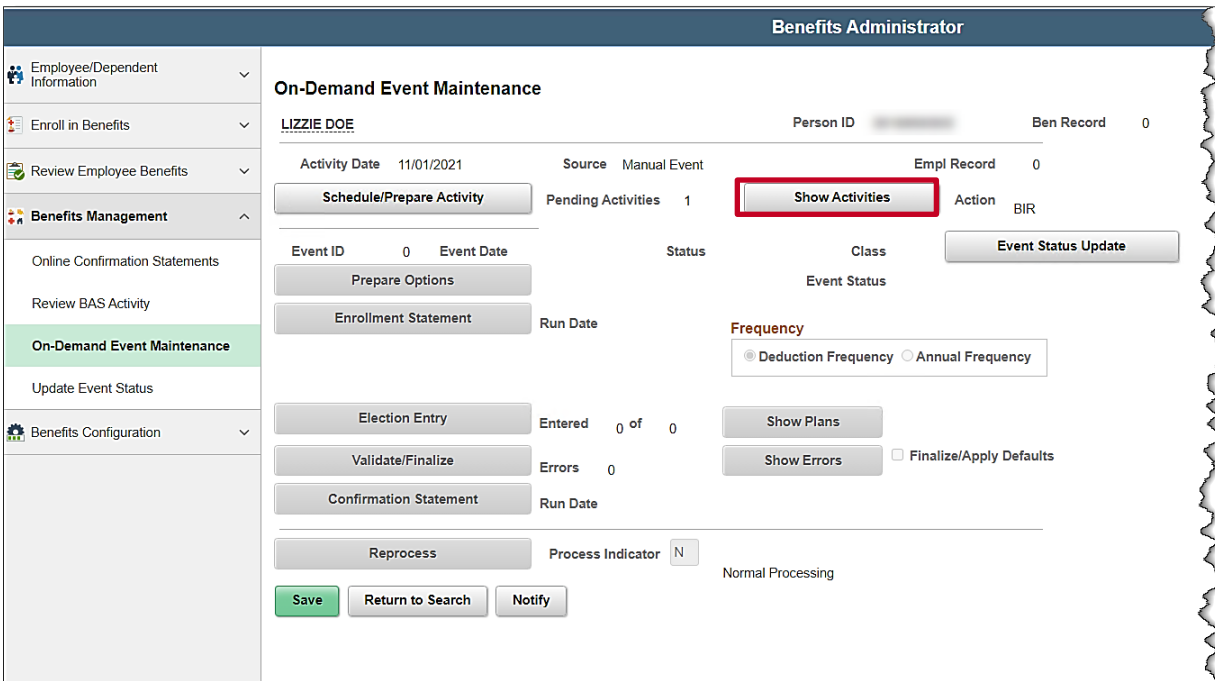
11. Enter the **Empl ID** in the corresponding search box.

12. Click **Search**.

The **On-Demand Event Maintenance** page displays for the Employee.

Note: If there is a delay between creating the event on the Review BAS Activity page and navigating to the On-Demand Event Maintenance page, the Benefits Administration process may have run, which would schedule the activity for you. In this case, skip to Step 18.

13. Click on the **Show Activities**.

The **Bas Activity** table pop up displays.

14. Confirm that the manual event just added (BIR) has a check in the checkbox.

15. Click **OK.**

The **On-Demand Event Maintenance** page returns.

16. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity and opens election entry for this event.

17. Click **OK** in the pop-up window.

The **On-Demand Event Maintenance** page returns.

18. Click on the **Election Entry** button to open the benefit admin election pages.

The **Option Election** page will display.

19. Click on the magnifying glass next to **Option Code** under the **Plan Type 10: Medical** section.

The **Option Code** options display for the Plan Type 10: Medical.

20. Select the same type of plan the employee currently has but with a **Coverage Code 4** (Family coverage).

The **Election Entry** page returns.

21. Click on the **Dependents/Beneficiaries** tab.

The **Dependent/Beneficiairy** tab displays.

22. Click on the **Change/Add Dependent Data** hyperlink to add the dependent to the employee record.

The **Dependent Data** page pop up displays.

23.   Click on **Edit Name**.

The **Name** page pop-up displays.

24.   Enter the **First Name** and **Last Name**. The other fields are optional.

25.   Click **OK.**

   Note: The dependent's name will now show next to the **Display Name** field.

The **Dependent Information** page returns.

The **Address** page displays.

26.   Check the box next to **Same Address as Employee**.

Note: If the Locality BA receives a **Phone Number** and/or **Email Address** for the dependent, this is the page used to enter that information. For this example, there is no information for Phone or Email. These fields are not required.

27.   Click on **Personal Profile** tab.

The **Personal Profile** page displays.

28.   Enter the **Date of Birth** for the dependent.

29.   Click the **Relationship to Employee** dropdown and select **Child.**

30. Select **Approved Dependent** from the drop down next to **Dependent Beneficiary Type.**

31. Select the **Gender** from the drop-down menu.

    Note: If any additional information was provided by the employee for the dependent, enter it on this page. The Student and Smoker checkboxes are not used on this page.

32. Enter the **National ID** for the dependent.

    Note: If the employee has not provided a dependent's SSN, the Locality BA should leave the field blank. However, when the SSN becomes available, the employee or Locality BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, agencies should make at least three attempts at obtaining the dependents SSN. Agencies can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

33. Click **OK**.

The **BenAdmin Data Entry** page displays.

BenAdmin Data Entry			×

Help

Event / Participant Selection	Option Election	Dependents / Beneficiaries

Schedule ID EM00   Employee ID ▓▓▓▓▓▓   LIZZIE DOE
Event ID 2   Event Data 11/01/2021   Birth or Adoption
Benefit Record 0   Excess Credit Rollover To   Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	
Doe,Billy	Spouse	Approved Dependent	02/05/1993	
Doe,Lily	Child	Approved Dependent	10/04/2021	

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents	

OK	Cancel	Apply		Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

34. Confirm that both dependents display under the **Dependent/Beneficiaries Currently on Record** section.

35. Click on the **Option Election** tab.

The **Option Election** page displays.

36.   Click on the magnifying glass under ***ID** field.

Note: To add dependents to **Plant Type 10: Medical** Family coverage you can either click on **Enroll All** or add them one by one individually. For this scenario, we will show how to add them one by one.

The **Look Up ID** page pop up displays.

37.   Click on the dependent you want to enroll in the medical plan benefits. In this example it would be the **Child.**

The **Option Election** page returns.

38. Click **OK.**

The **On-Demand Event Maintenance** page returns.

39. Confirm the **Status** is **Entered,** and the **Event Status** is **Open for Processing.**

40. Click on **Validate/Finalize** button to execute the programming process to validate elections, close the event, and update the Base Benefits Tables.

41. Click **OK** on the pop-up window**.**

The **On-Demand Event Maintenance** page refreshes and returns.

42. Confirm the **Status** is **Finalized – Enrolled** and the **Event Status** is **Closed to Processing.**

    Note: The Coverage Begin Date for **Birth** and **Adoption** is the date of the event as opposed to the top of month the way it is in BES.